H1 Update

2025

Benchmarks Report

State of GTM in 2025 H1

This report examines how sales teams are performing against lowered quotas and what that reveals about execution gaps.

It also analyzes efficiency trends, the widening velocity delta between top and bottom performers, and the role of ICP discipline in determining whether teams hit or miss their number.

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Executive Summary

Guy Rubin

MD of Insights at

FULLCAST

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Quotas Lowered. But Sellers Still Struggling.

In 2025, even after quotas were reduced by 13.3%, seller performance remains under strain. Nearly 77% of sellers still missed quota, which shows the problem isn't just goal-setting, it's execution.

Our analysis of 440K opportunities, representing $43B in pipeline, reveals the tension. Growth is slow—just 5.2%. Sales efficiency has slipped by 12.7%.

Yet buried in the data is this paradox:
Sales velocity shows an enormous 10.8x delta between top and average performers.

This means the best teams aren't working harder. They're working smarter, moving the right deals through the funnel with speed and precision. But too many teams are still chasing volume, not impact, and it shows up in missed quotas and stagnant growth.

The CRO survey data confirms the gap

many leaders admit their ICP discipline is inconsistent. Without clear focus on who to sell to and how, reduced quotas alone won't fix the problem.

Executive Summary

Alan Morton
Managing Director

SBRConsulting

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The world of Go-to-Market execution is evolving faster than ever.

The technology continues to evolve, but it's the people behind the numbers who determine whether a strategy succeeds or stalls. As leaders, our responsibility is not only to equip teams with the right tools but also to ensure they have the insights to develop and deliver a data-driven growth strategy.

This report reinforces what we at SBR Consulting see every day: the best-performing organisations are those that have visibility on how they are performing and then hold themselves accountable to execution excellence.

Our purpose has always been to help organisations turn strategy into execution. Over the past 23 years, working with more than 1000 businesses across 38 countries, we've seen how insights can transform performance.

As you explore these benchmarks, I encourage you to view them not just as data points, but as decision levers.

Behind every metric lies an opportunity to focus, inspire, and build the habits of high performance in your leaders, managers and reps.

Pipeline and Survey Results

Analyzed by

FULLCAST

440K

Opportunities Analyzed

$43 Billion

Value of Opportunities Analyzed

118

CRO Responses on ICP

State of GTM in 2025 H1:
Seller Performance

-13.3%
quota target

76.6%
sellers missed quota

5.2%
growth rate

-12.7%
sales efficiency

10.8x
sales velocity delta

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Executive Summary from Fullcast CEO Ryan Westwood

The role of Revenue Operations has never been more important or more misunderstood.

Over the past decade, we've seen RevOps evolve from a back-office function into a strategic driver of growth. Yet too often, RevOps leaders are asked to deliver results without the clarity, resources, or recognition they deserve.

This report, and the conversations it sparks, are about preparing for a future where RevOps is taking the helm of a company's Go-to-Market engine.

At Fullcast, we believe the next wave of business transformation will depend on how effectively RevOps professionals can align **strategy, process, and technology to drive efficient growth.**

As you read through these insights, I encourage you to think beyond short-term metrics.

The real opportunity lies in reimagining RevOps as a function that sets the course, not just executes it. That's the future we're building toward and the future we're excited to share with you.

Ryan Westwood

CEO

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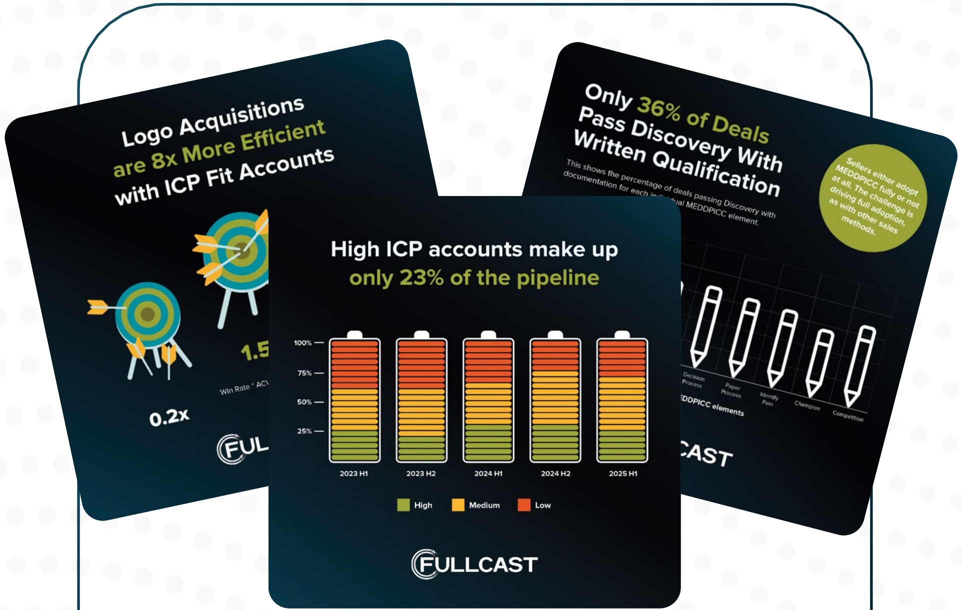
Why Is Sales Efficiency Falling Behind?



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On paper, efficiency should be improving. Average deal values have inched up by 1.8%, a small but meaningful gain. But when you zoom out, the bigger picture looks different.

Win rates have fallen by **8.3%.** Sales cycles have stretched nearly **7%.** And when you combine those factors, the result is a **12.7%** decline in overall sales efficiency.

Efficiency is calculated as average deal value multiplied by win rate, divided by the average sales cycle. Bigger deals don't matter if sellers are closing fewer of them and taking longer to get there. The compounding effect is what's eroding efficiency across the board.

High-performing teams know that the lever includes tightening ICP discipline, improving pipeline quality, and attacking deals with urgency.

Efficiency is the clearest indicator of whether GTM teams are creating real, scalable revenue impact.

State of GTM in 2025:

Calculating The Efficiency

$ 1.8%
Avg deal value

X

-8.3%
Win rate

DIVIDED BY

+6.9%
Avg sales cycle

=

-12.7%
sales efficiency

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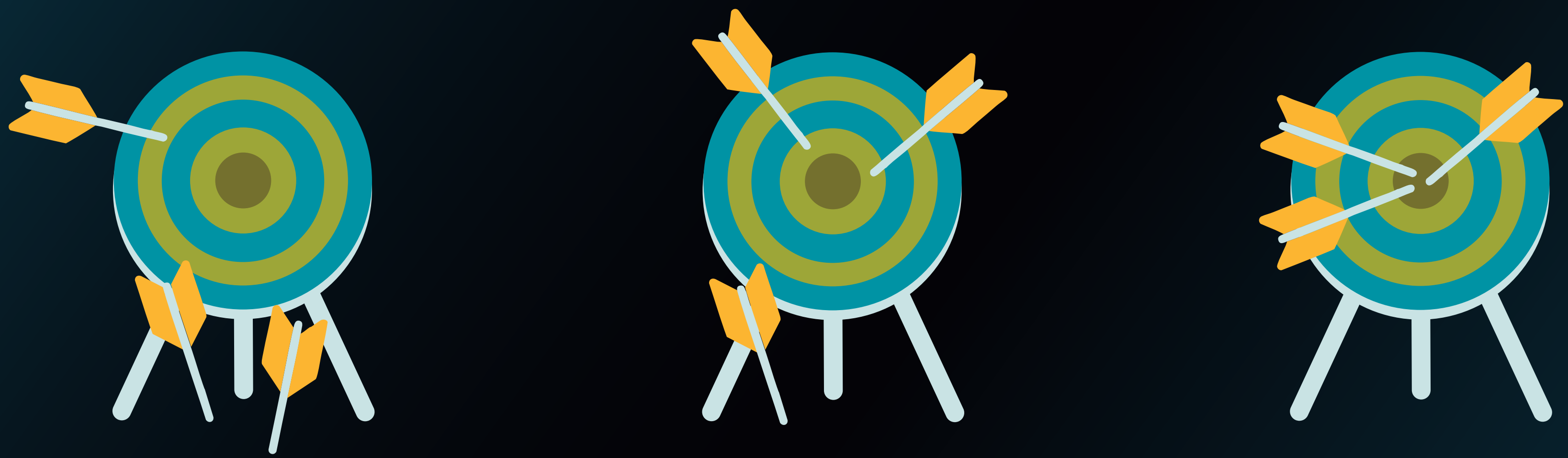
Logo Acquisitions are 8x More Efficient with ICP-Fit Accounts



0.2x	0.8x	1.5x

Sales Efficiency = Win Rate * ACV / Sales Cycle

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Why Does Precision Beat Pipeline Every Time?

For a long time, the playbook was simple

You just needed to keep the pipeline full and the numbers will take care of themselves. But in 2025, that doesn't hold up. More pipeline isn't leading to more revenue; it's leading to more waste. Teams are chasing deals that don't fit, efficiency is slipping, and CAC is climbing.

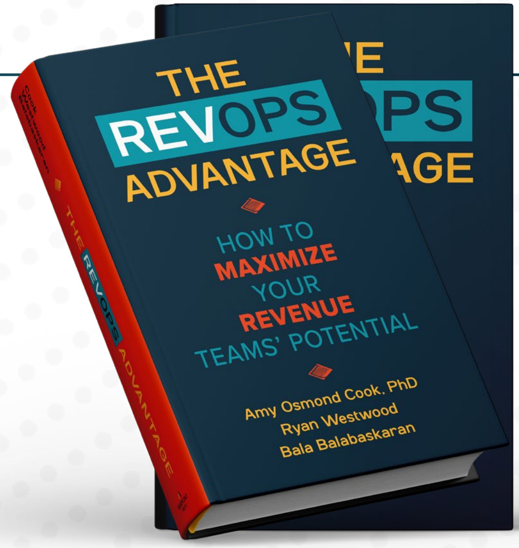
The teams that are winning have flipped the script. They focus on precision. When an account is truly ICP-fit, it's

8x more efficient.

Deals move faster, contracts are bigger, and customers stick around longer.

That's why precision beats pipeline.

Efficiency is the real growth currency now, and ICP fit is the mulitplier. And it only pays off if that first deal turns into long term value.



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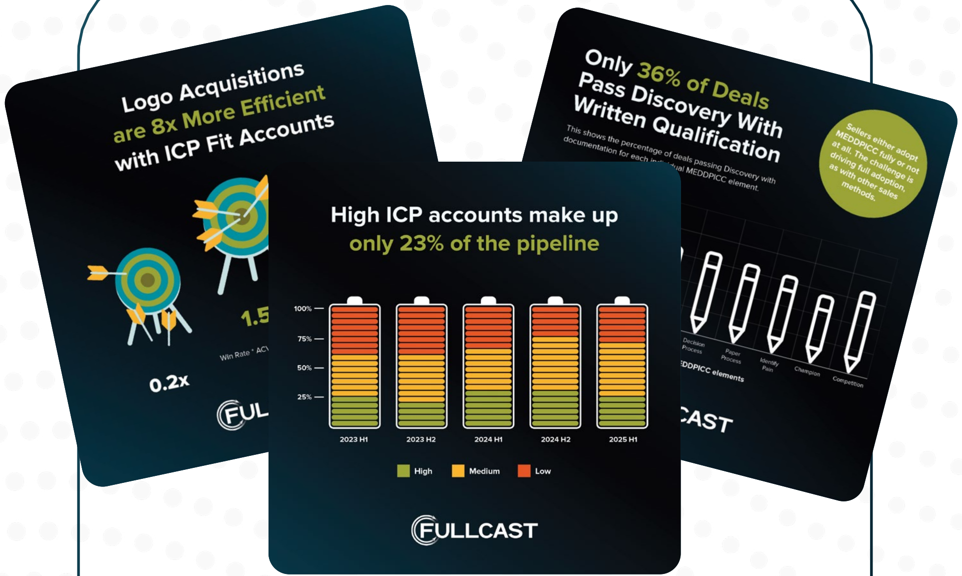

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The First Deal is Just the Beginning.

Winning a new logo used to feel like the finish line. But today, it's only the starting point.

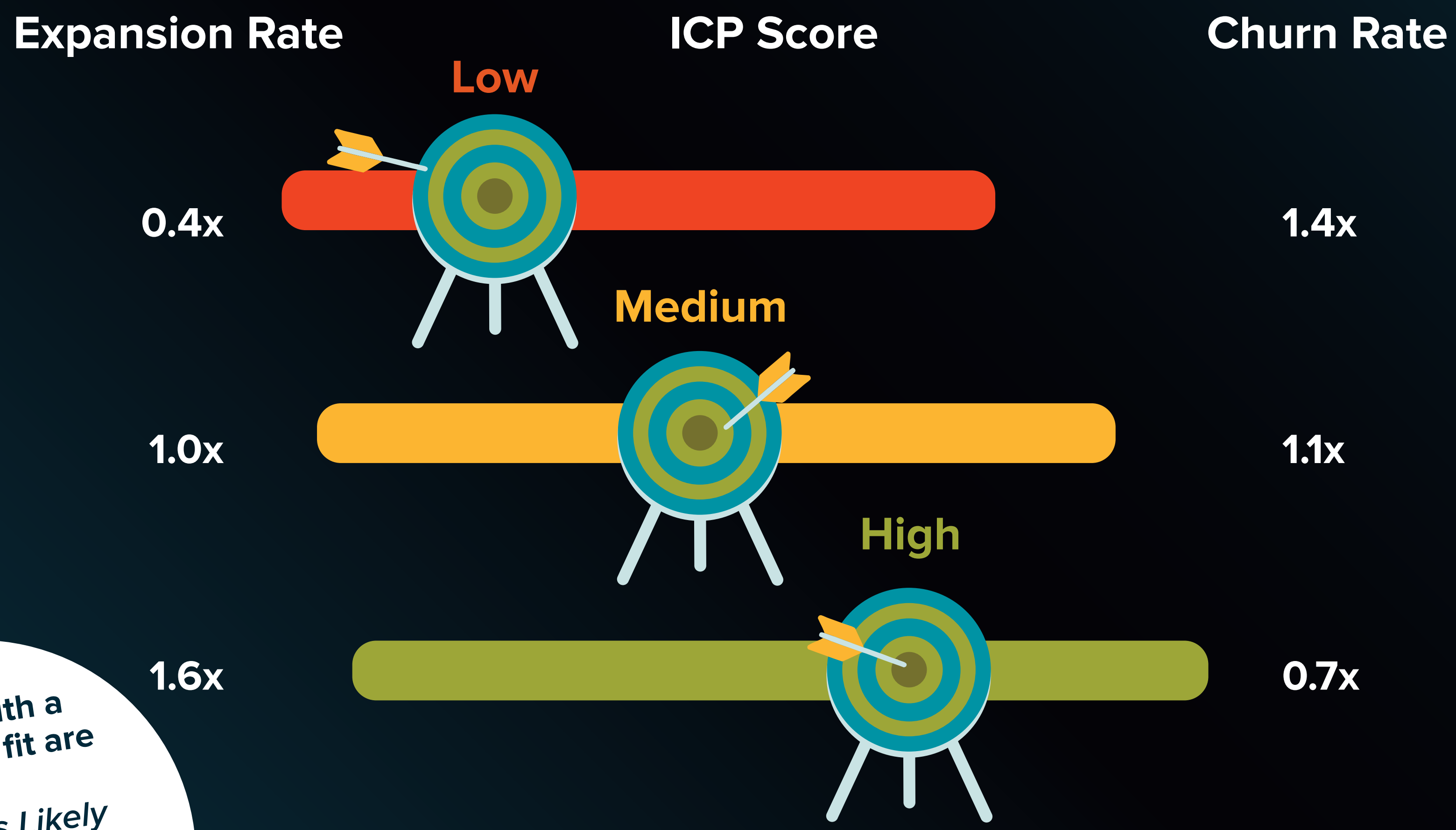
Research from the Winning by Design team shows most companies **spend $2–$3 to acquire just $1 of revenue.** At that rate, customers have to stick around seven to nine years before the math even breaks even.

The right accounts don't just buy once; they renew, expand, and compound value over time. In fact, our data shows ICP-fit accounts are **5.1x more valuable** across their lifetime than low-fit accounts.

The true power of ICP is all about turning **every first win into durable, growing revenue.**

The problem is too many companies are still getting ICP wrong.

High ICP-Fit Accounts Deliver 5.1x Higher LTV



LTV=revenue per account / churn rate

Clients with a strong ICP fit are

2x *Less Likely to Churn*

4x **More Likely to Expand.**

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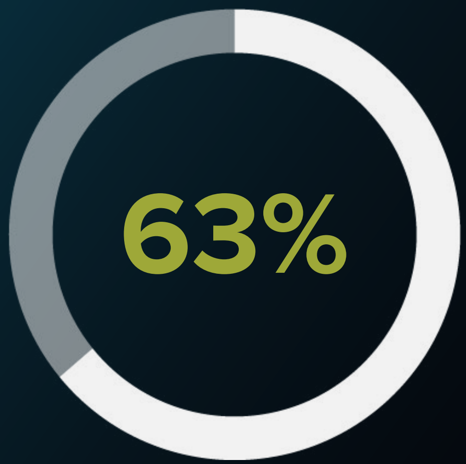
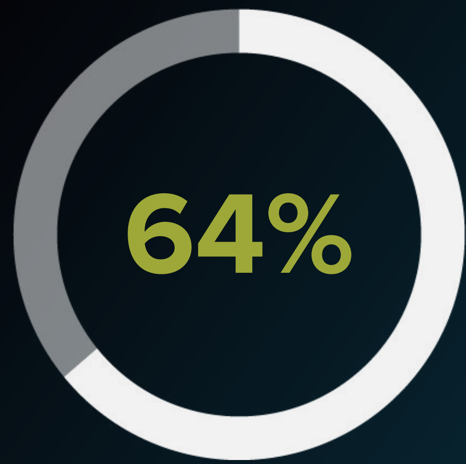
CRO Confidence is Slipping



of CROs have little or no confidence in their ICP definition.

of ICP definitions are based on past experience or gut feeling



of CROs review their ICP annually, and 24% review every 2+ years.

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Is Your ICP
Alive or Outdated?

ICP might be one of the hottest topics in GTM right now, but most teams still mismanage it.

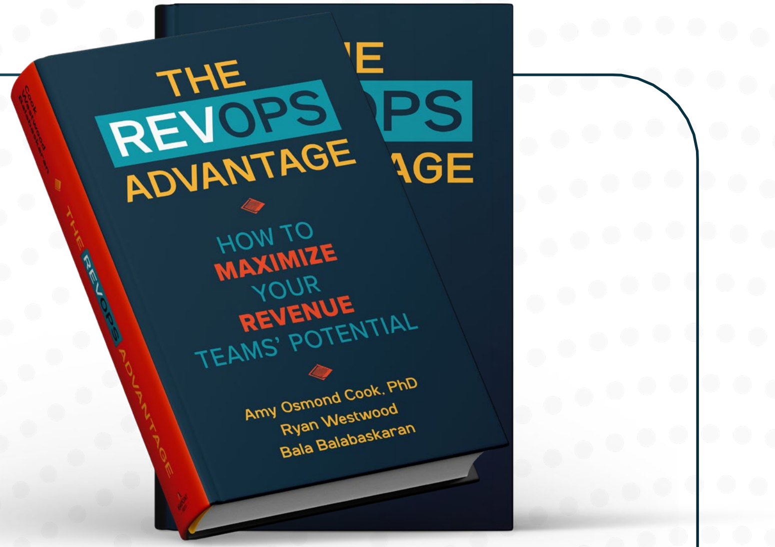
Too often, it gets defined once and left on a slide deck, built on assumptions or gut feel. Meanwhile, markets shift, buyer needs change, and technology keeps rewriting how decisions get made.

Our research with 118 CROs shows the gap: 63% have little or no confidence in their ICP. More than half (56%) still define it based on past experience or intuition, and nearly two-thirds (64%) revisit it only once a year or not at all.

The cost of an outdated ICP is steep:

wasted cycles, shrinking margins, and missed opportunities. The companies that win take a different approach. They treat ICP as a living, data-driven system, updating it regularly, grounding it in market signals, and validating it against performance.

When ICP is alive and embedded, it reshapes how we think about pipeline itself and what really drives revenue efficiency.



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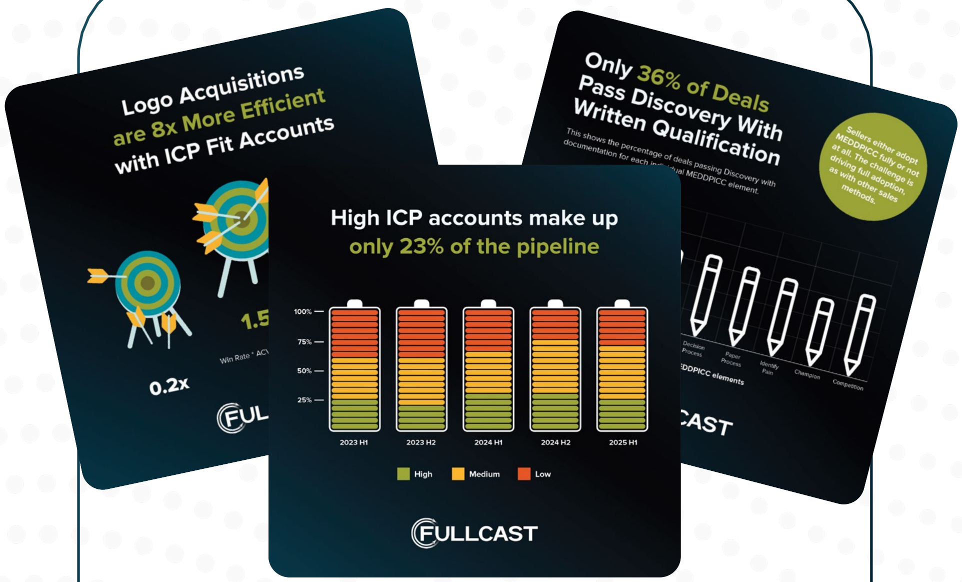

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Pipeline Volume isn't the Same as Pipeline Quality.

For years, pipeline has been treated as a volume game.

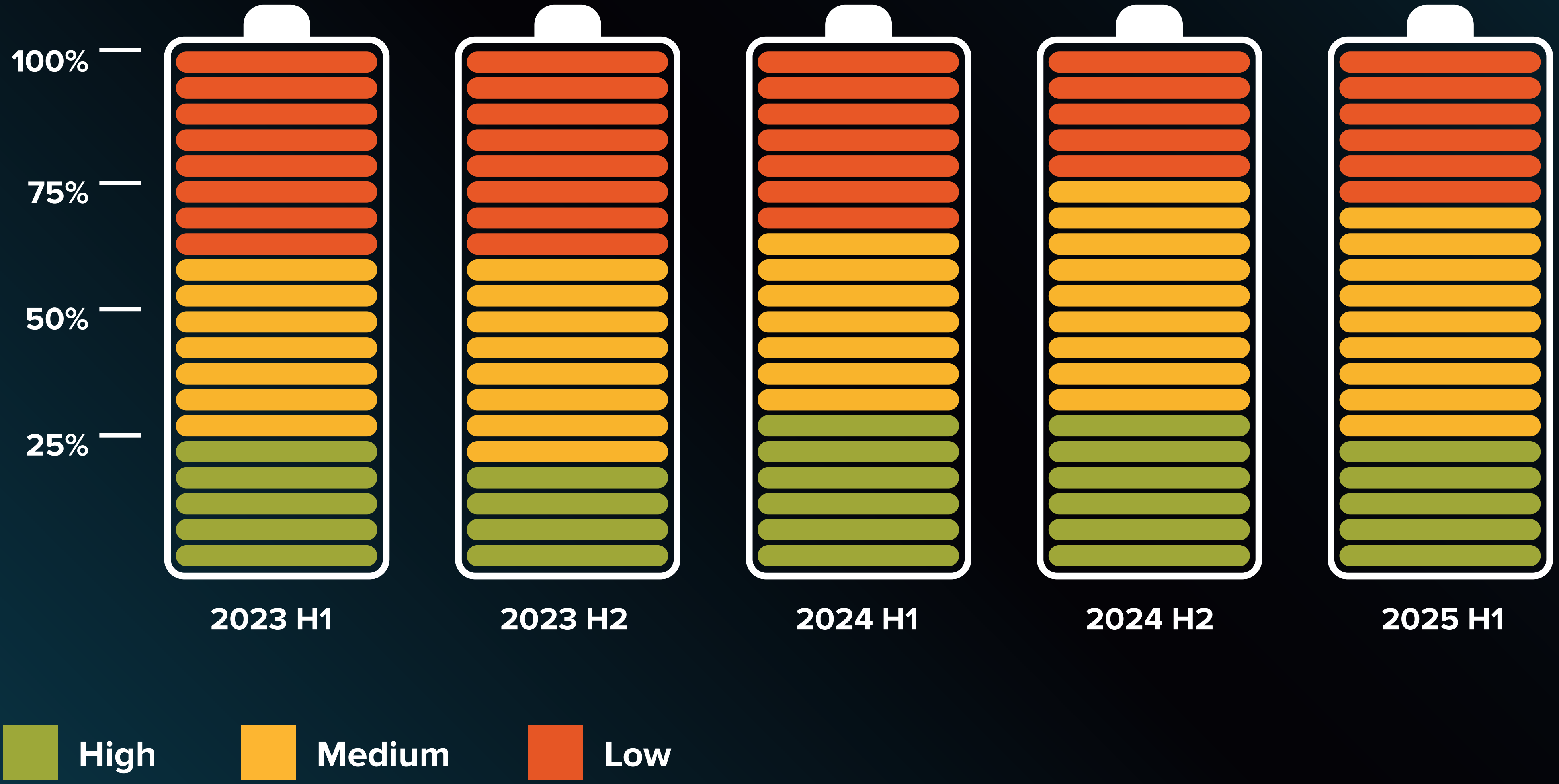
But volume without fit is a false signal. Our data shows that high-ICP accounts make up only **23%** of total pipeline, a sharp imbalance for teams trying to hit ambitious growth goals.

Too many GTM teams are still chasing activity and logos, instead of building real ICP coverage.

Pipeline health isn't about how much you can stuff into the funnel. It's about how much of it actually fits.

The shift ahead is from filling pipeline to engineering pipeline, deliberately shaping it around high-fit accounts where **every opportunity carries outsized efficiency and long-term value.**

High-ICP Accounts Make up Only 23% of the Pipeline



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Well-Qualified Deals Win 6.3x More Often

8%
Win rate

Low

23%
Win rate

Medium

50%
Win rate

High

Qualification Score

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Why Qualification Still Decides the Outcome.

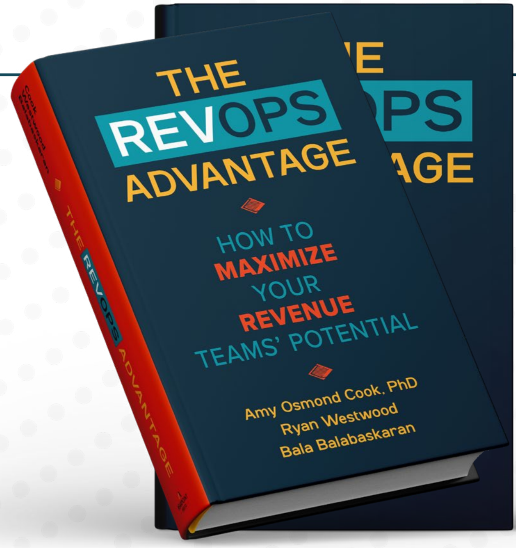
In today's GTM environment, sellers can't afford to chase every deal that raises a hand.

The difference between a deal that's truly qualified and one that isn't is massive. Our data shows well-qualified deals win **6.3x** more often than poorly qualified ones.

High-performing teams use qualification as a lever to prioritize where to spend time, how to engage, and when to walk away. The result: faster cycles, cleaner forecasts, and higher conversion rates.

Poorly qualified deals may pad pipeline numbers, but they rarely close.

Qualification turns pipeline from a vanity metric into a performance driver.



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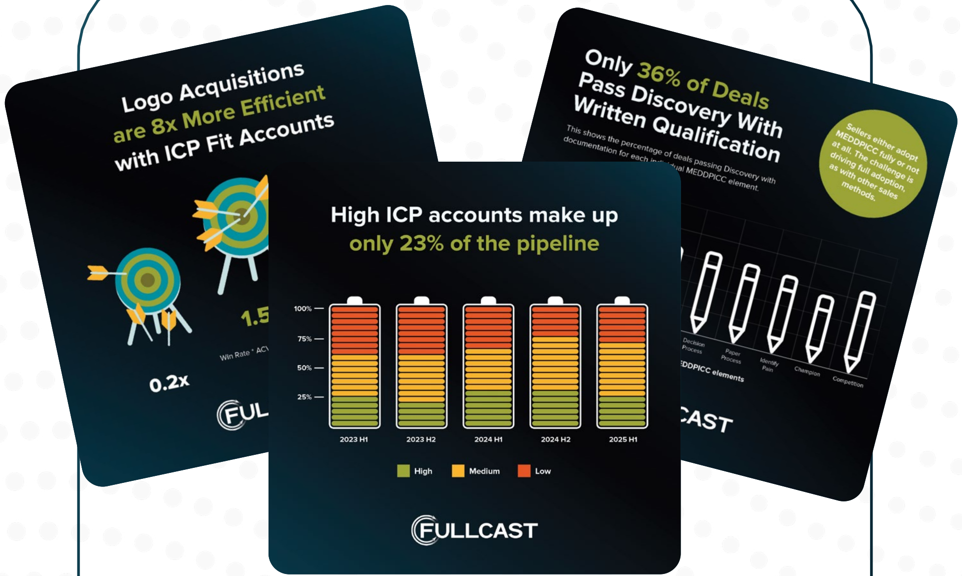

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Stronger Qualification Speeds Up the Close.

Qualification changes the entire rhythm of the deal.

Our data shows the average deal takes **91 days** to close. But when deals are highly qualified, with clear alignment on business priorities, that timeline drops to just **71 days**, which is a **21.6% acceleration.**

The benefits don't stop there. Well-qualified deals are also **1.9x less likely** to slip beyond 90 days, giving sales leaders a steadier forecast and more predictable revenue.

Stronger qualification means faster momentum, fewer surprises, and cleaner execution.

In an environment where time kills deals, **that discipline is what separates the teams that hit their number from the ones that miss it.**

Stronger Qualification Drives
Faster, More Predictable Closures

91 DAYS Average deals

71 DAYS Highly-qualified deals

21.6% faster

Well-qualified deals with strong alignment on business priorities closed 21.6% faster

1.9x less likely to slip

Well-qualified deals are 1.9x less likely to slip more than 90 days

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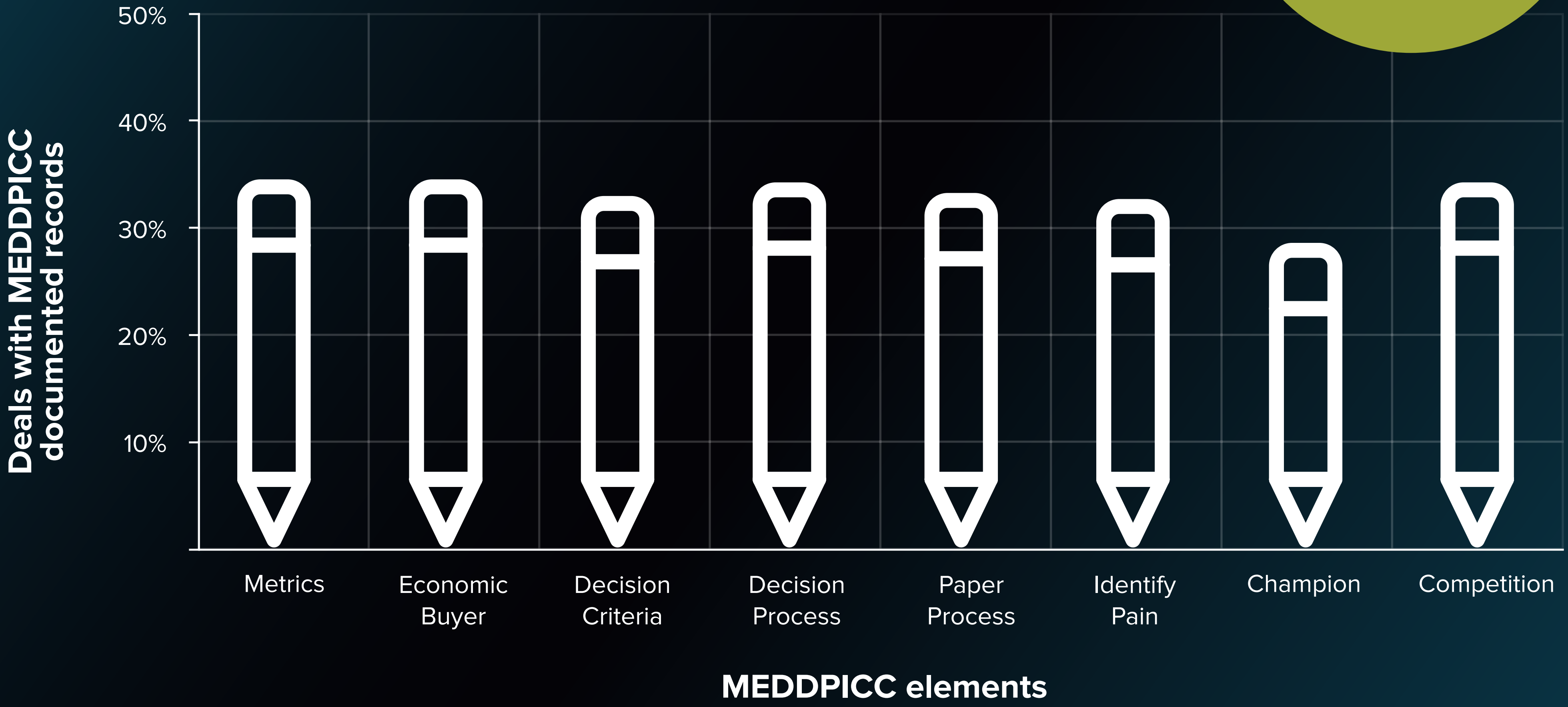
Only 36% of Deals Pass Discovery With Written Qualification

This shows the percentage of deals passing discovery with documentation for each individual MEDDPICC element.

Sellers either adopt MEDDPICC fully or not at all. The challenge is driving full adoption, as with other sales methods.



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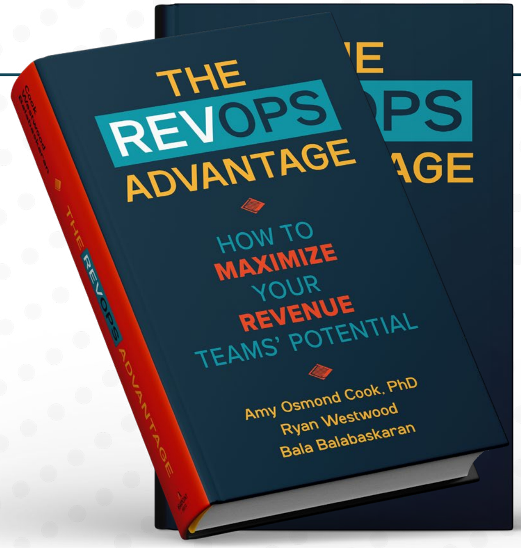
Most Deals Don’t Make It Through Discovery.

Only 36% of deals pass discovery with written qualification.

When it comes to sales methodology, sellers tend to go all-in or not at all. MEDDPICC adoption follows the same pattern; teams either embrace it fully or barely use it.

The real challenge isn’t the method itself, it’s driving consistent, full adoption across the organization.

Without that discipline, deals stall, forecasts wobble, and efficiency suffers. **Written qualification is the gatekeeper to predictable, high-performing pipeline.**



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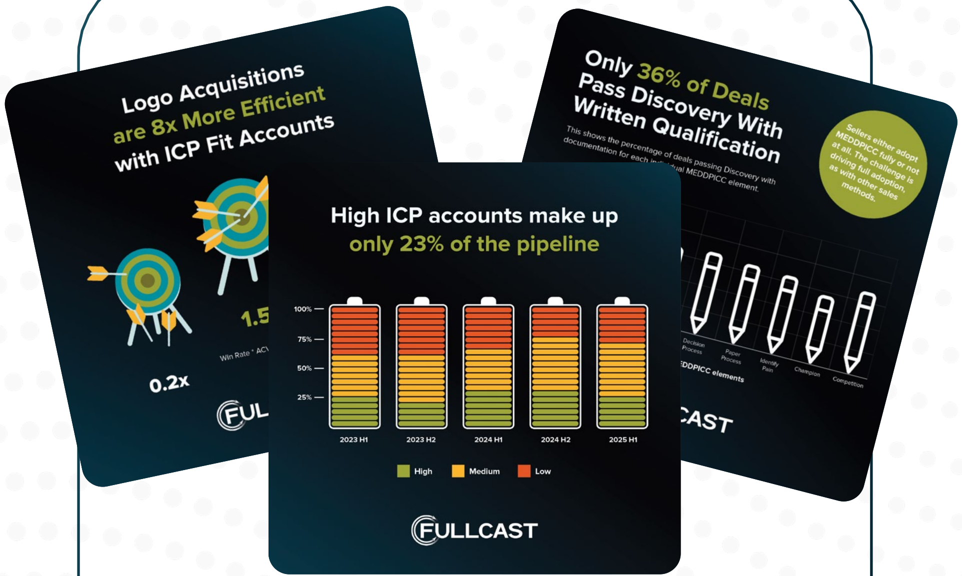

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Closed-Won Deals Follow a Disciplined Qualification Journey.

Our data tracks stage-by-stage MEDDPICC scores for successful deals, rated on a 1–5 scale.

Higher scores reflect stronger, more complete qualification at each stage of the journey.

High-performing sellers don't try to boil the ocean during Discovery. They ask the right questions at the right time, building clarity without overcomplicating the process. By the time a deal reaches Closing, every MEDDPICC element is understood, documented, and aligned, setting the stage for predictable wins.

Discipline at each stage is the difference between deals that stall and deals that close successfully.

Closed-Won Deals Follow a Disciplined Qualification Journey

Stage-by-stage average MEDDPICC scores for successful deals, with higher scores showing stronger qualification, rated on a 1-5 scale.

MEDDPICC elements	Discovery	Alignment	Proposal	Negotiation	Closing
Metrics	2.9	3.3	3.5	3.6	4.2
Economic Buyer	3.0	3.5	3.7	3.8	4.3
Decision Criteria	2.8	3.4	3.5	3.7	4.2
Decision Process	2.2	2.9	3.2	3.4	4.0
Paper Process	2.4	2.7	3.2	3.4	3.8
Identify Pain	3.3	3.9	4.0	4.1	4.4
Champion	3.0	3.4	3.7	3.8	4.2
Competition	3.3	3.6	4.0	4.1	4.6
Avg. Rigor Score (depth/completeness of MEDDPICC element)	2.9	3.3	3.6	3.7	4.2

High-performing sellers don't "boil the ocean" in discovery. They ask the right questions at the right time.

By the closing stage, every MEDDPICC element is understood and documented.

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Top Performers Disqualify Rigorously for Maximum Efficiency

	Discovery		Initial Demo		People		Selection		Negotiation		Contract	
Sellers	% Convert	% Slip	% Convert	% Slip	% Convert	% Slip	% Convert	% Slip	% Convert	% Slip	% Convert	% Slip
Manager	42%	26%	42%	23%	47%	26%	82%	0%	89%	9%	97%	3%
Seller 1 Team EMEA	29%	25%	88%	13%	86%	0%	100%	0%	100%	0%	100%	0%
Seller 2 Team EMEA	70%	17%	39%	26%	67%	11%	67%	0%	75%	0%	100%	0%
Seller 3 Team EMEA	56%	24%	47%	18%	38%	63%	80%	20%	75%	0%	100%	0%
Seller 4 Team EMEA	37%	35%	15%	41%	29%	29%	100%	0%	75%	0%	100%	0%
Seller 5 Team EMEA	38%	38%	27%	45%	63%	25%	57%	0%	100%	0%	100%	0%
Seller 6 Team EMEA	42%	17%	60%	20%	33%	67%	100%	0%	100%	0%	100%	0%

Low/avgerage performers face 2x more slippage, especially during early/mid funnel stages. Closing qualification gaps is key to improving performance.

Seller 1 (top performer) rigorously qualifies from discovery (34% more than average), focuses on high-fit deals, drives a 75% win rate (versus an average of 22%), and minimizes slippage.

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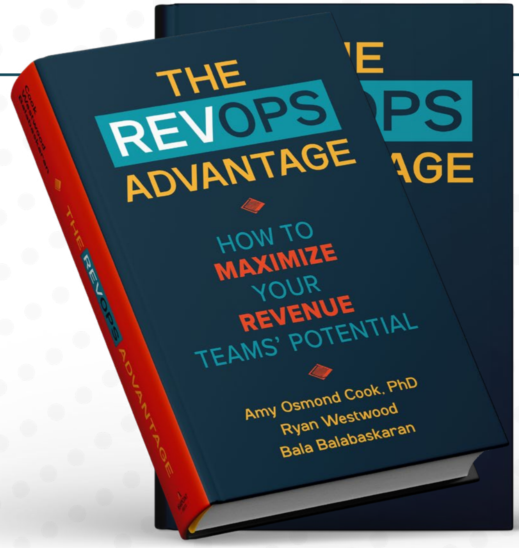
Top Performers Disqualify to Drive Maximum Efficiency.

Not all sellers are created equal.

Low-and average-performing reps face **2x more** deal slippage, especially in the early and mid-funnel stages. Closing those qualification gaps is the fastest path to better performance.

Top performers take a different approach. One example, a high-performing seller rigorously qualifies deals from Discovery (34% more than the average) focuses only on high-fit opportunities, and drives a **75% win rate** compared with a **22% average.**

The result is faster, more predictable pipeline and minimal slippage.



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Disqualification isn't about saying "no" for the sake of it. It's about preserving time, energy, **and focus for the deals that truly matter.**

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Who Are the People Behind the Reports?

FULLCAST

At Fullcast, we help revenue teams sell better with the industry's first end-to-end Revenue Command Center.

Behind these reports is the team that builds the platform powering territory design, quota planning, lead routing, commissions management, business intelligence, and more. The Fullcast product suite helps you sell better, from plan to pay.

Meet the people and the platform that make these insights possible and see how Fullcast helps revenue teams turn data into smarter decisions and better results.

If you want to find out how your team compares to the benchmarks and discuss how you can increase quota attainment, **book a meeting with our team at Fullcast.com.**

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SBR Consulting is a global sales consultancy that focuses on growth and revenue acceleration.

1000+ clients

23 years of service

110,000+ professionals

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